Working with Ad Hoc Documents
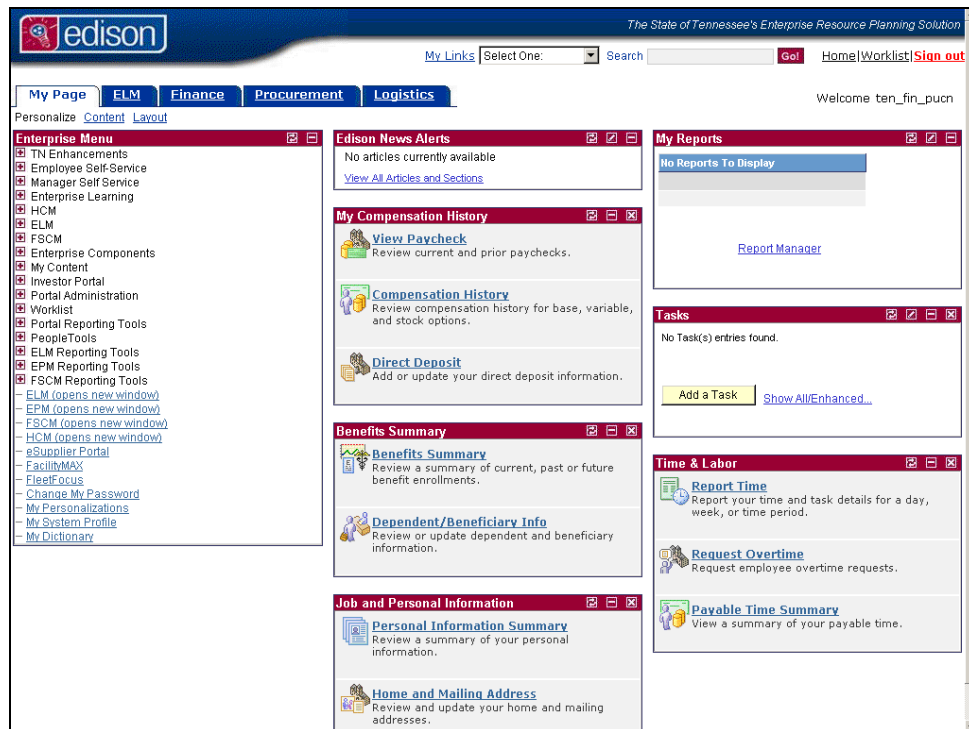
Created on Tuesday, April 15, 2008

Table of Contents

## Ad Hoc Documents

Create an Ad Hoc Document

Ad hoc documents are stand-alone documents not associated with transactional purchasing contracts. Purchasing contracts and ad hoc documents differ in the way that they are processed and the underlying bind variables they reference. ex: Pro-Forma and RFP are commonly ad hoc documents.
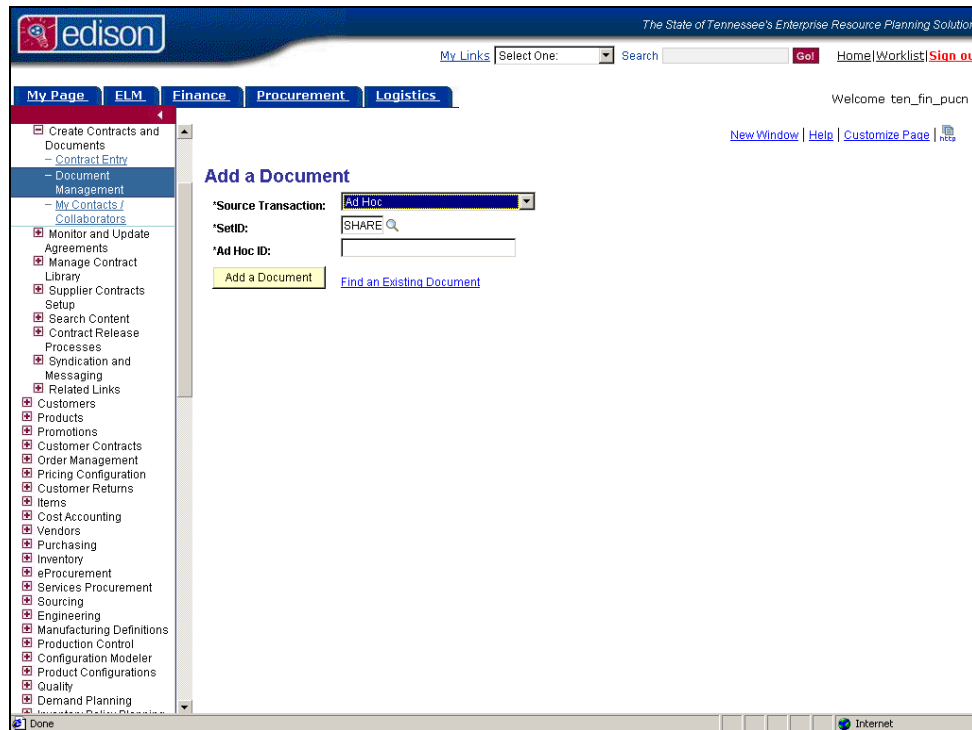
Procedure

In this topic you will create an ad hoc document.

Step	Action
1.	Click the **FSCM** link. ⊞ FSCM
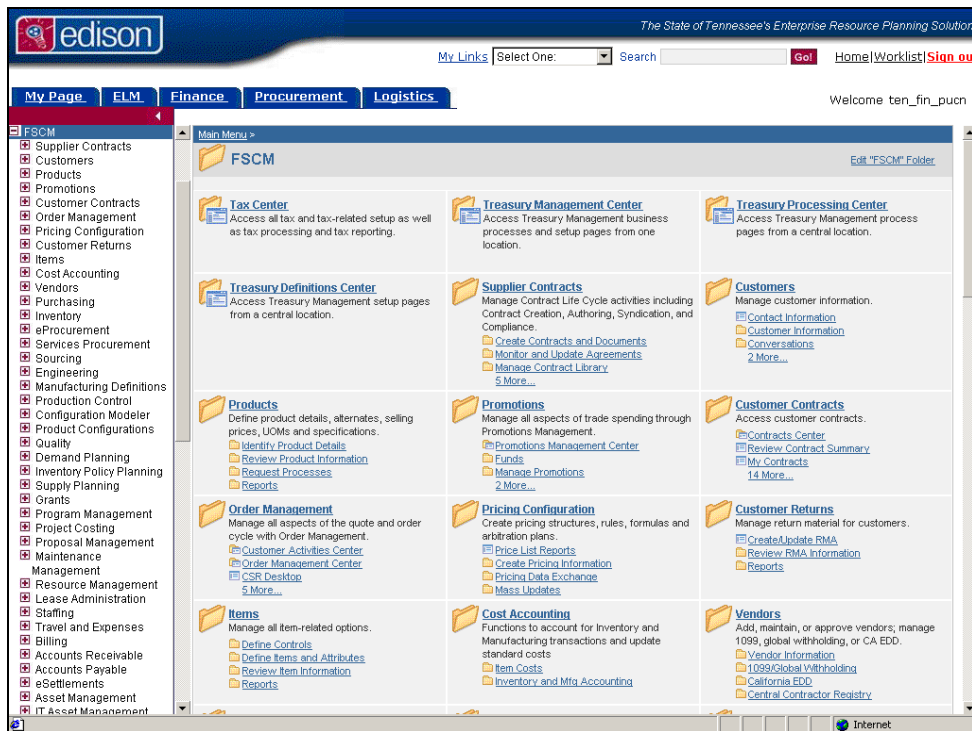
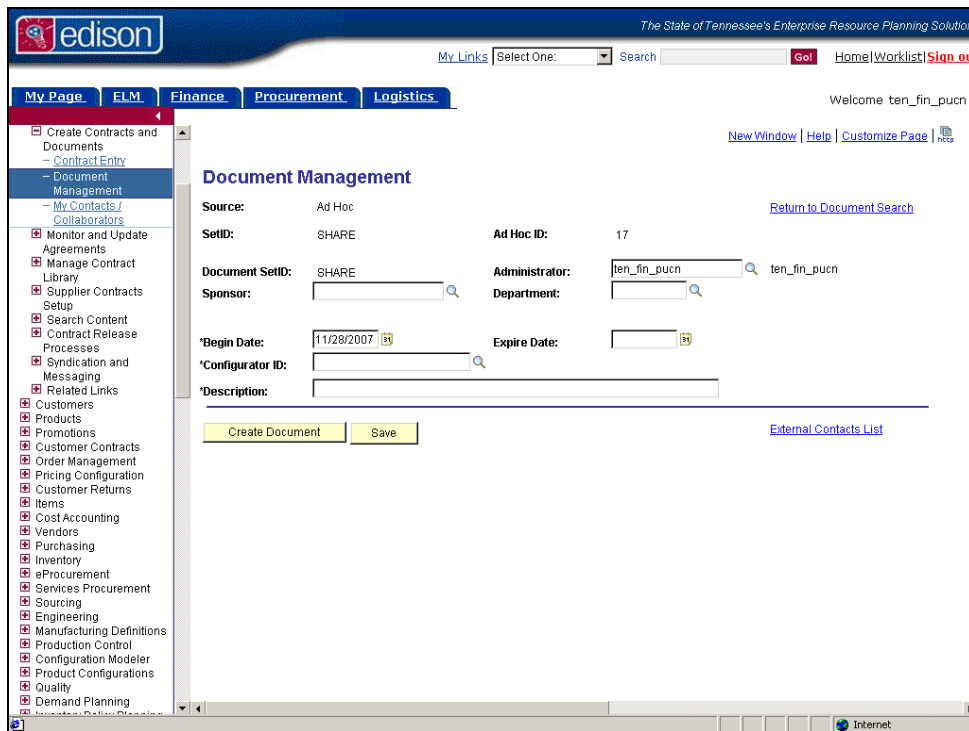| Step	Action
2.	Click the **Supplier Contracts** link. ⊞ Supplier Contracts
3.	Click the **Create Contracts and Documents** link. ⊞ Create Contracts and Documents
4.	Click the **Document Management** link. Document Management
5.	An Ad Hoc ID can be any unique combination of letters and numbers.

Step	Action
6.	Click in the **Ad Hoc ID** field.
7.	Enter the desired information into the **Ad Hoc ID** field. Enter "**17**".
8.	Click the **Add a Document** button.
9.	The **Department** will default from the sponsor's name if available.

Step	Action
10.	The **Configurator ID** is a template for how the contract will be laid out. Depending on which configurator you choose Edison might ask you questions to aid in developing the document. Click in the **Configurator ID** field.
11.	Enter the desired information into the **Configurator ID** field. Enter "**RF**".
12.	Click the **Look up Configurator ID** button.
13.	Click an entry in the **Configurator ID** column. RFP
14.	Click in the **Description** field.
15.	Enter the desired information into the **Description** field. Enter "**Proposal for renovations of the Mental Health Services**".
16.	The configurator that was chosen has questions associated with it. You will answer these questions on the next page. Click the **Create Document** button.

Step	Action
17.	Click in the **Response** field.
18.	Enter the desired information into the **Response** field. Enter "**Mental Health Services**".
19.	Click in the **Response** field.

Step	Action
20.	Enter the desired information into the **Response** field. Enter "**Renovate the Mental Health buildings**".

Step	Action
21.	Click in the **Response** field.

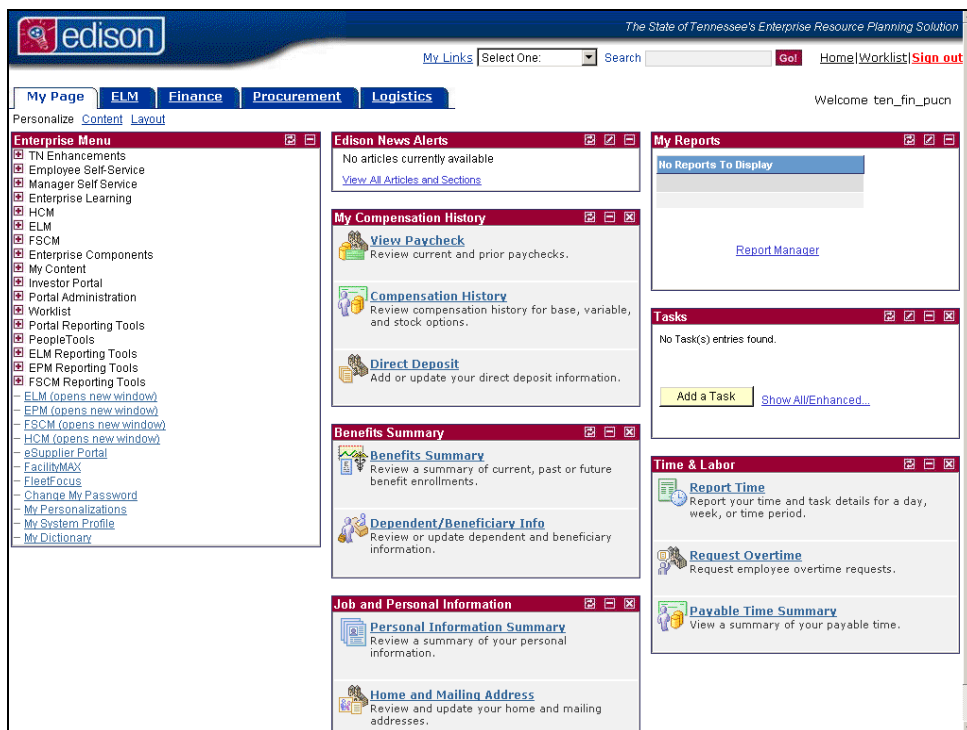| Step	Action
22.	Enter the desired information into the **Response** field. Enter "**Larry David**".
23.	Click in the **Response** field.
24.	Enter the desired information into the **Response** field. Enter "**615-555-4027**".
25.	Click the scrollbar.

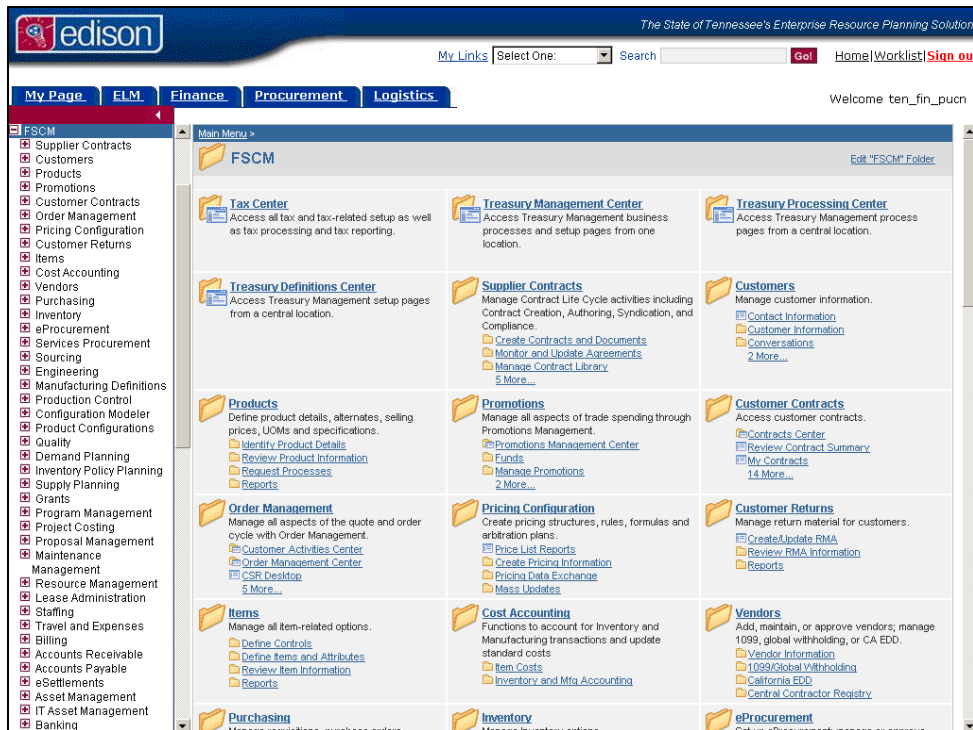| Step	Action
26.	Click the **Finish** button. Finish
27.	On this page you can view, edit, or submit the document. For more information on documents please refer to the U*sing Documents* topic in the *CN1*.
28.	You have sucessfully created an Ad Hoc Document. **End of Procedure.**

Requesting Collaboration on Documents

The Edison system allows different users to edit, review, and change the same document.
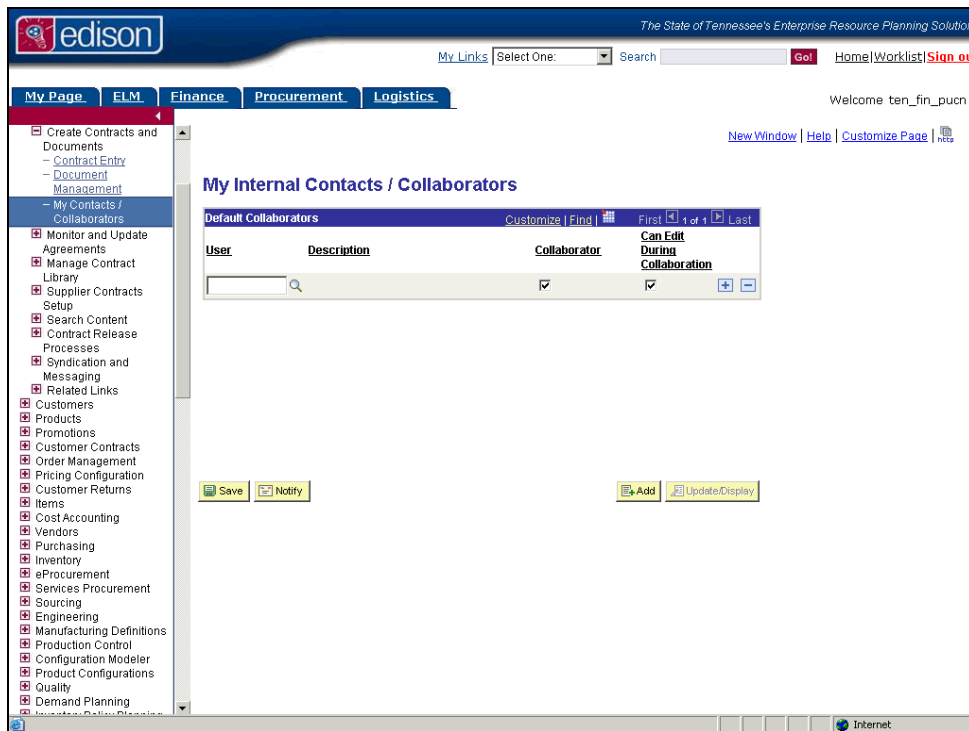
Procedure

In this topic you will add a collaborator to your list of default collaborators. Then you will navigate to a document and add this contact as a collaborator.
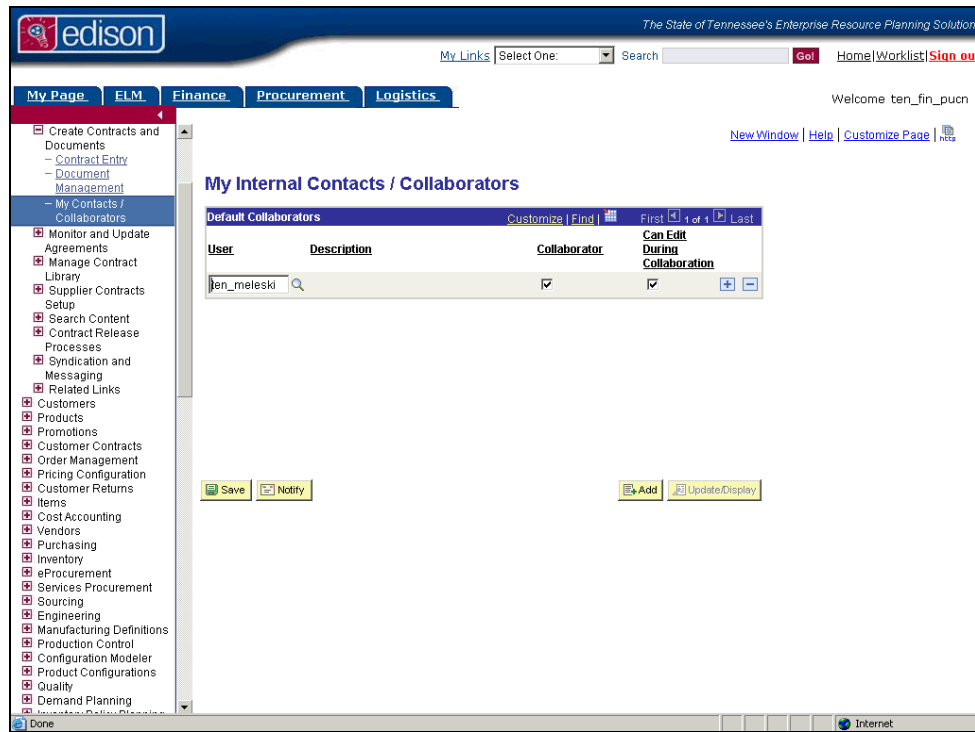

Step	Action
1.	Click the **FSCM** link. ⊞ FSCM

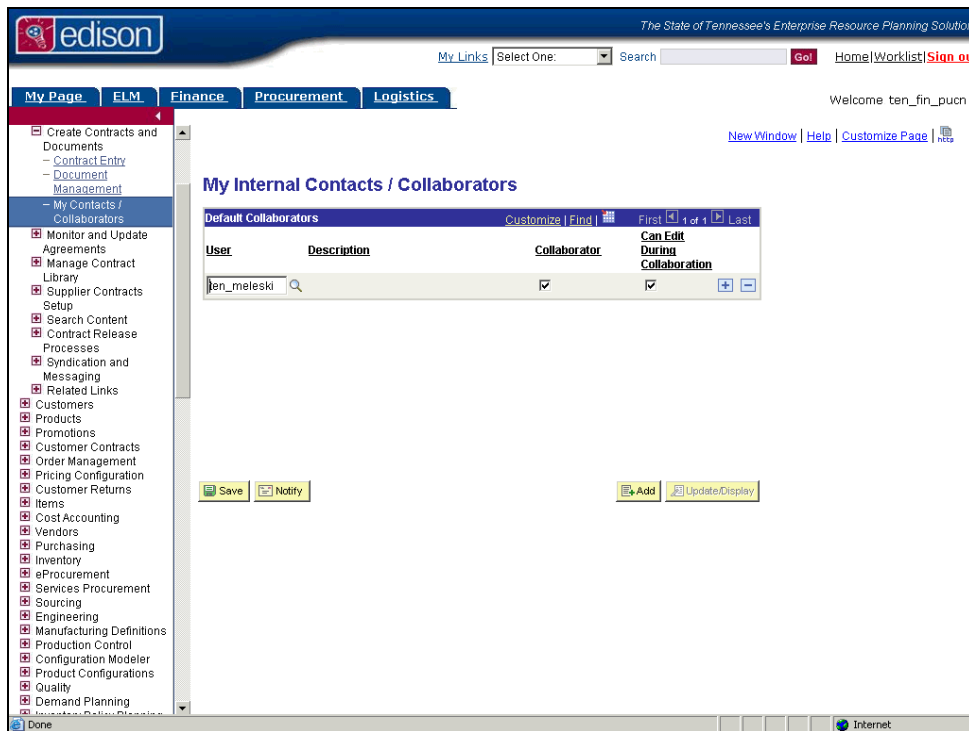| Step	Action
2.	Click the **Supplier Contracts** link. ⊞ Supplier Contracts
3.	Click the **Create Contracts and Documents** link. ⊞ Create Contracts and Documents
4.	Click the **My Contacts / Collaborators** link. My Contacts / Collaborators
5.	This page allows you to input users with whom you commonly collaborate with. Whenever requesting collaboration on a document you have a chance to edit collaborating users. Hence, if a user is entered on this page it doesn't necessarily mean you have to collaborate with that user
6.	In the **User** field enter the User name of a valid Edison user that you would like to collaborate with.

Step	Action
7.	Click in the **User** field.
8.	Enter the desired information into the **User** field. Enter "**ten_meleski**".
9.	When the **Collaborator** box is selected it allows the user on this line to review and make comments on documents that you create. But it does not give this user the authorization to edit the document.
10.	Select the **Can Edit During Collaboration** box to indicate that the collaborator can edit documents during the collaboration process. To edit a document the user must download a copy of the document to their hard drive and then upload after they make changes. After collaboration is complete, the document administrator has the ability to accept or delete any or all changes made using Microsoft Track Changes functionality. Note: You must have Microsoft Word 2003 or higher to be able to view the documents.
11.	If you leave both the **Collaborator** and the **Can Edit During Collaboration** check boxes cleared, you can associate these users as interested parties to a specific contract for read-only access any time during the document's life cycle.

Step	Action
12.	Click the **Save** button.

Step	Action
13.	Click the **Document Management** link. Document Management
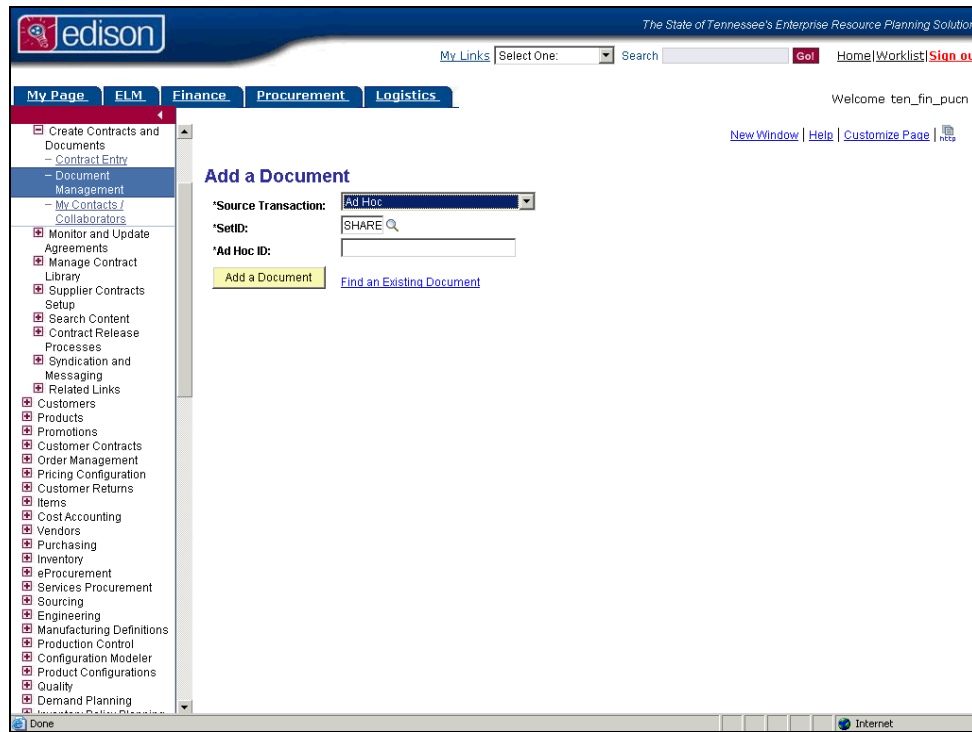
Step	Action
14.	Click the **Find an Existing Document** link. Find an Existing Document

Step	Action
15.	Click the **Source Transaction** list. `Ad Hoc`
16.	Click the **Purchasing Contracts** list item. `Purchasing Contracts`
17.	Click the **Look up Contract ID** button.
18.	Click an entry in the **Contract ID** column. `0000000000000000000001615`
19.	Click the **Search** button.

Step	Action
20.	Click an entry in the **Document Keys** column. SHARE / 000000000000000000001615

Step	Action
21.	Click the **Route for Collaboration** button. Route for Collaboration
22.	Notice that the user that was just entered appears automatically as a collaborator
23.	The **Plus** and **Minus** buttons allow you to add or delete collaborators to this specific document.

Step	Action
24.	Click the **Add a new row at row 1** button.
25.	Click in the **User** field.
26.	Enter the desired information into the **User** field. Enter "**ten_bauer**".
27.	Click the **Collaborator** option.
28.	Click the **Can Edit During Collaboration** option.
29.	Click the **Route for Collaboration** button.
30.	The users that were asked to collaborate on the document may now review, comment, and edit (depending on their security) the document and mark it as such.
31.	Until the collaboration process has ended the document can not be approved. However the collaboration can be cancelled or modified by the creator of the document.
32.	You have sucessfully requested collaboration on a document. **End of Procedure.**

Collaborating on Documents

The Edison system allows different users to edit, review, and change the same document.

Procedure

In this topic you will find a document that has been edited by another user and routed the document over to you for collaboration. You will review and edit the document as necessary.
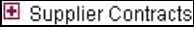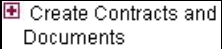
Step	Action
1.	It is possible to see documents that you have been requested to collaborate on in your **Worklist.** Or you can find the document you wish to collaborate on by searching for that document.
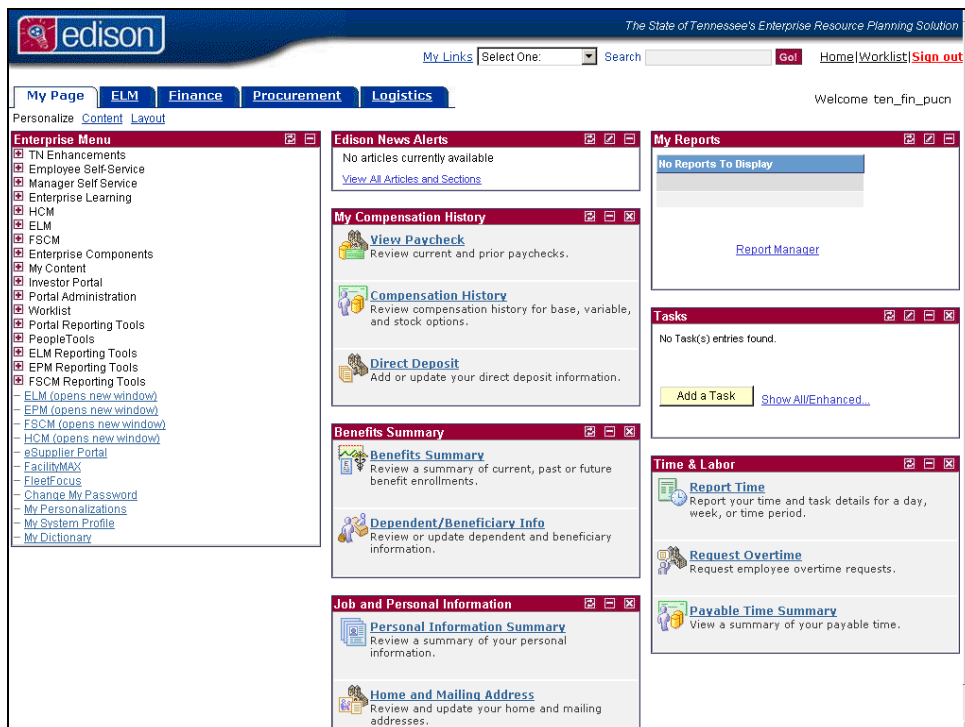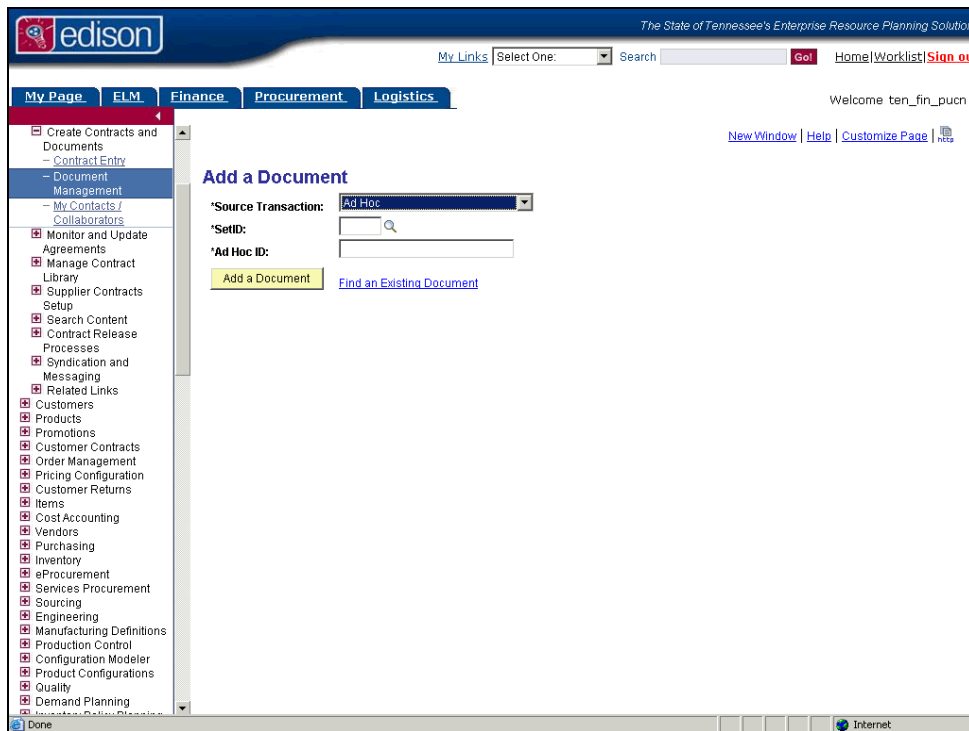
Step	Action
2.	Click the **FSCM** link.
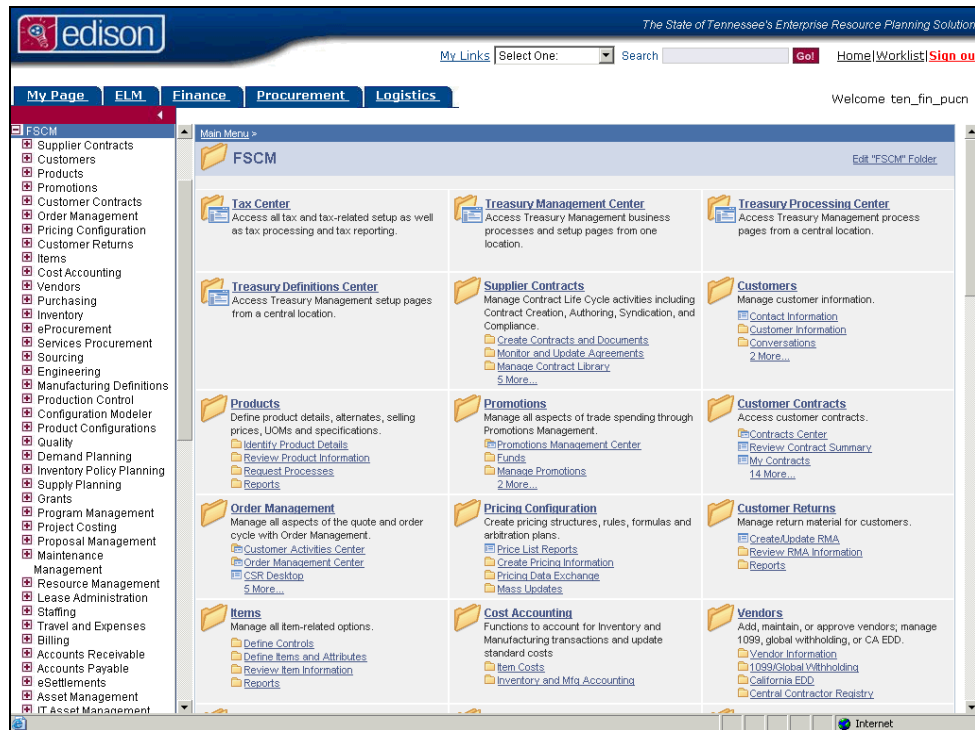
Step	Action
3.	Click the **Supplier Contracts** link.
4.	Click the **Create Contracts and Documents** link.
5.	Click the **Document Management** link.

Step	Action
6.	Click the **Find an Existing Document** link. Find an Existing Document

Step	Action
7.	Click the **Source Transaction** list. ![Ad Hoc]
8.	Click the **Purchasing Contracts** list item. ![Purchasing Contracts]
9.	Click the **Look up Contract ID** button. ![search icon]
10.	Click an entry in the **Contract ID** column. 0000000000000000000001620
11.	Click the **Search** button. ![Search]

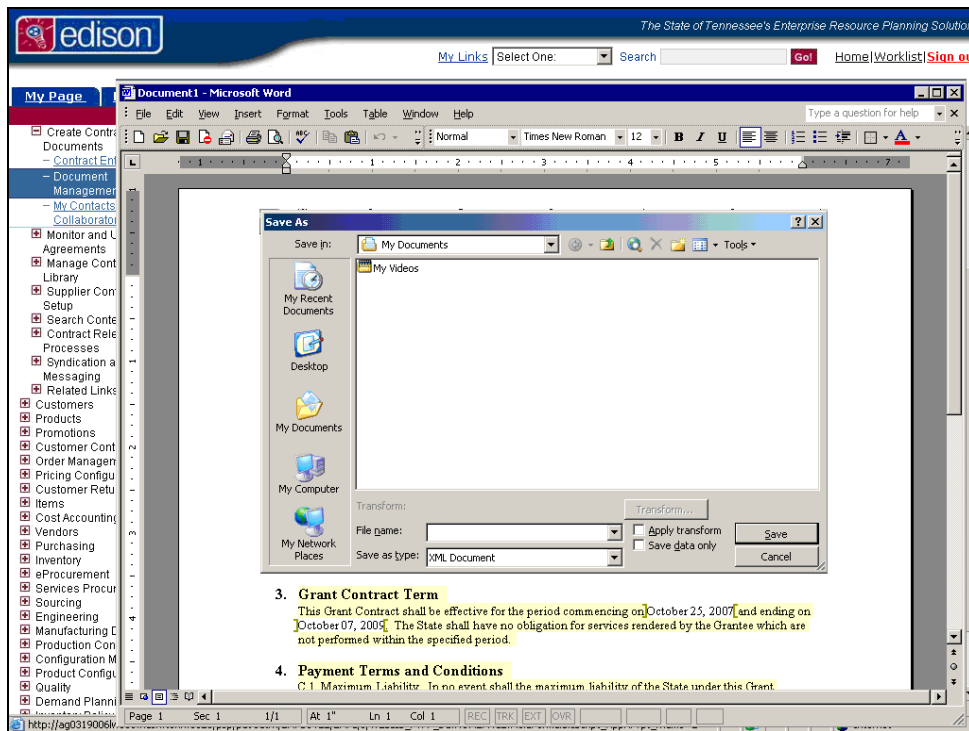| Step	Action
12.	Click an entry in the **Document Keys** column. SHARE / 000000000000000000001620
13.	You can view, edit, and make comments about the document from this page

| Step	Action
14.	Click the scrollbar.
15.	Use the **View Document** button to view the document.
16.	Clicking this button will open a new window. Make sure that your browser's pop up blocker is turned off or you can press the Ctrl key on the keyboard while clicking the button. Press the **[Ctrl]** key and click the **Edit Document** button. Edit Document
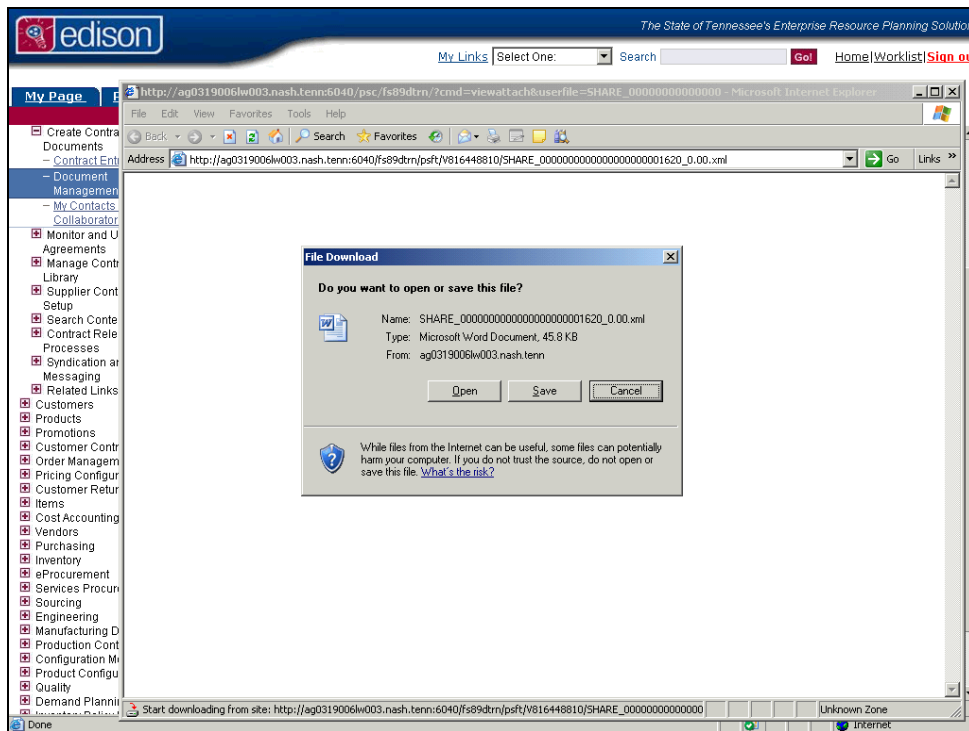
Step	Action
17.	Press the **Save** button.
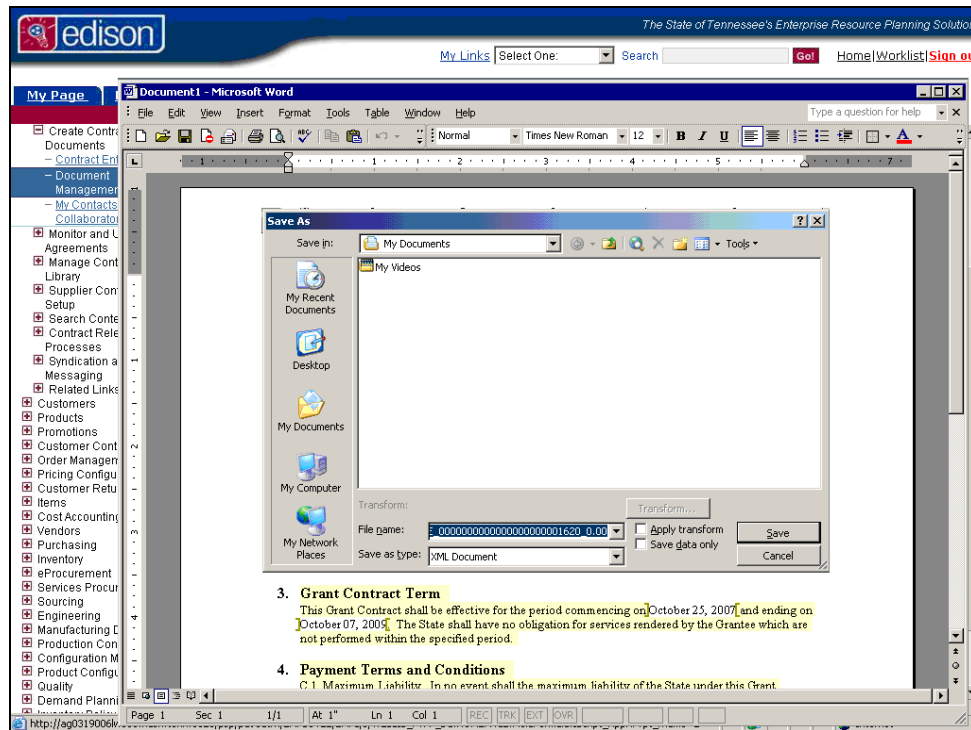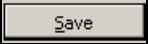
Step	Action
18.	Click the **File Name** field.
	_00000000000000000001620_0.00

Step	Action
19.	Enter the desired information into the **File Name** field. Enter "**Collaboration Contract**".
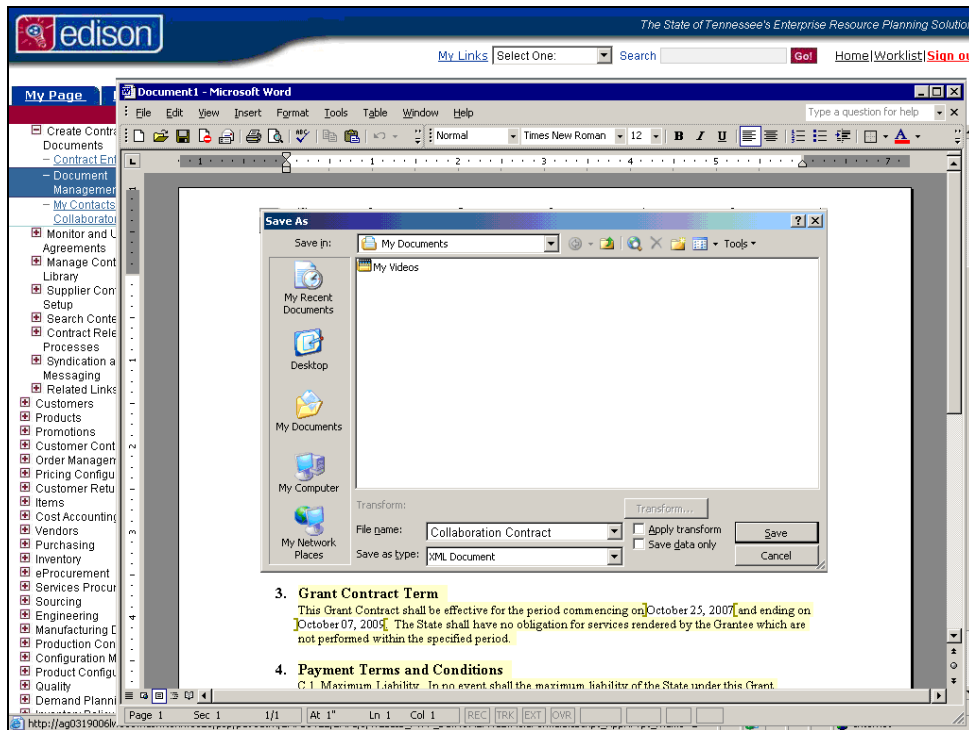
Step	Action
20.	Click the **Save** button.
21.	The highlighted text is standard clause language from the library, and the text between the brackets are bind variable information.
22.	Click in the text behind *SERVICES*.
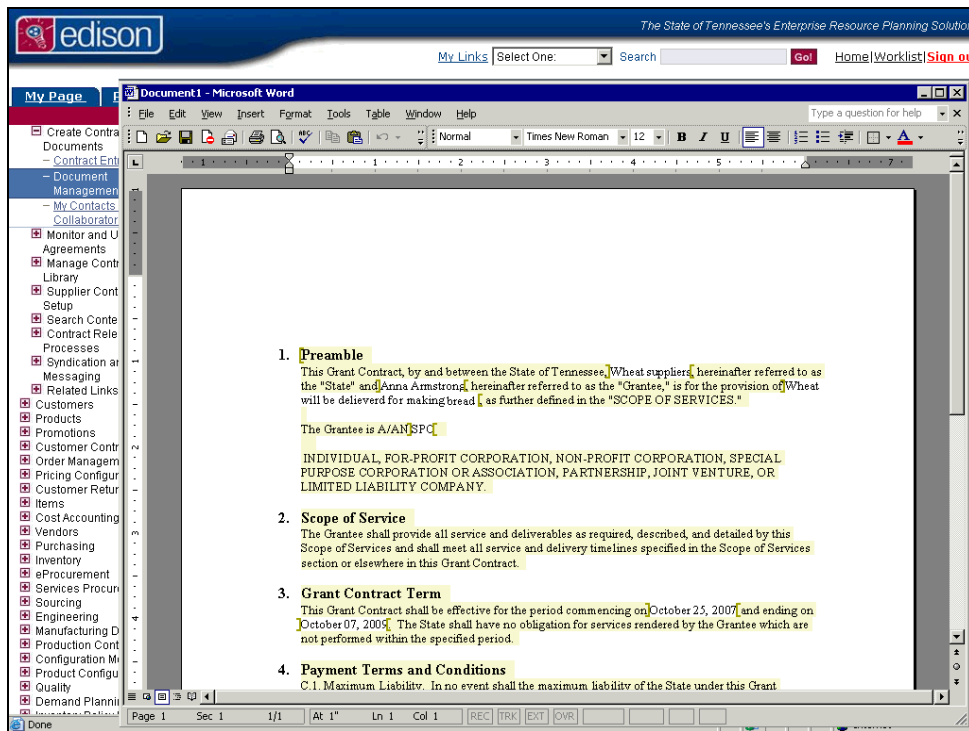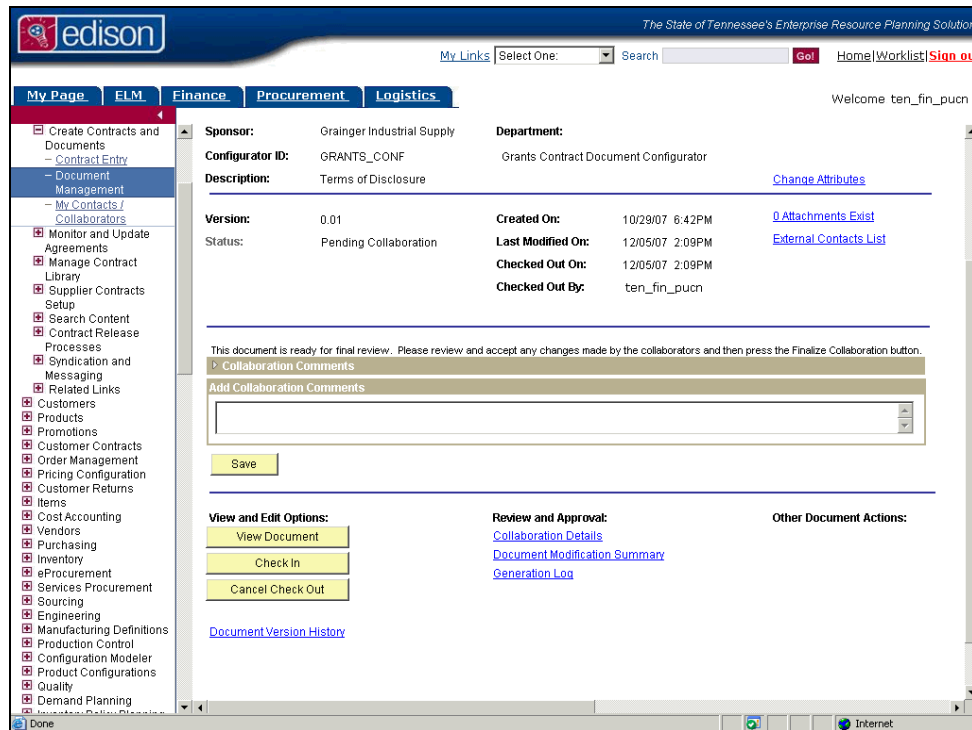
Step	Action
23.	Enter the desired information into the text. Enter "**DOCUMENT**".
24.	To have the changes you make to the document appear in Edison the document you saved on your computer must be uploaded into Edison.
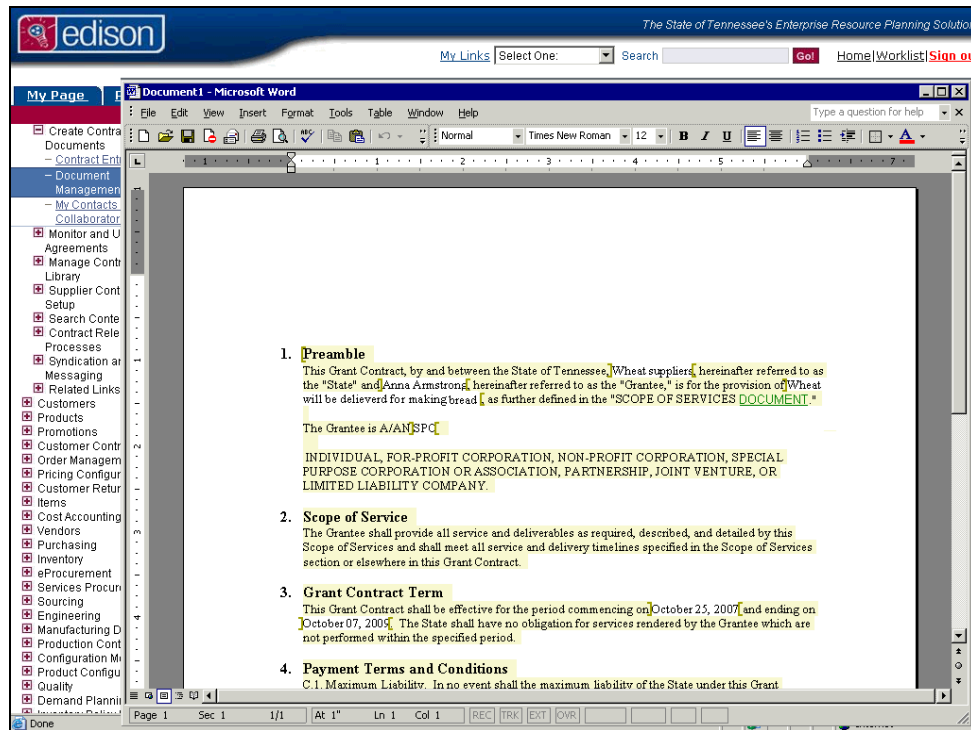
Step	Action
25.	Click the **File** menu.
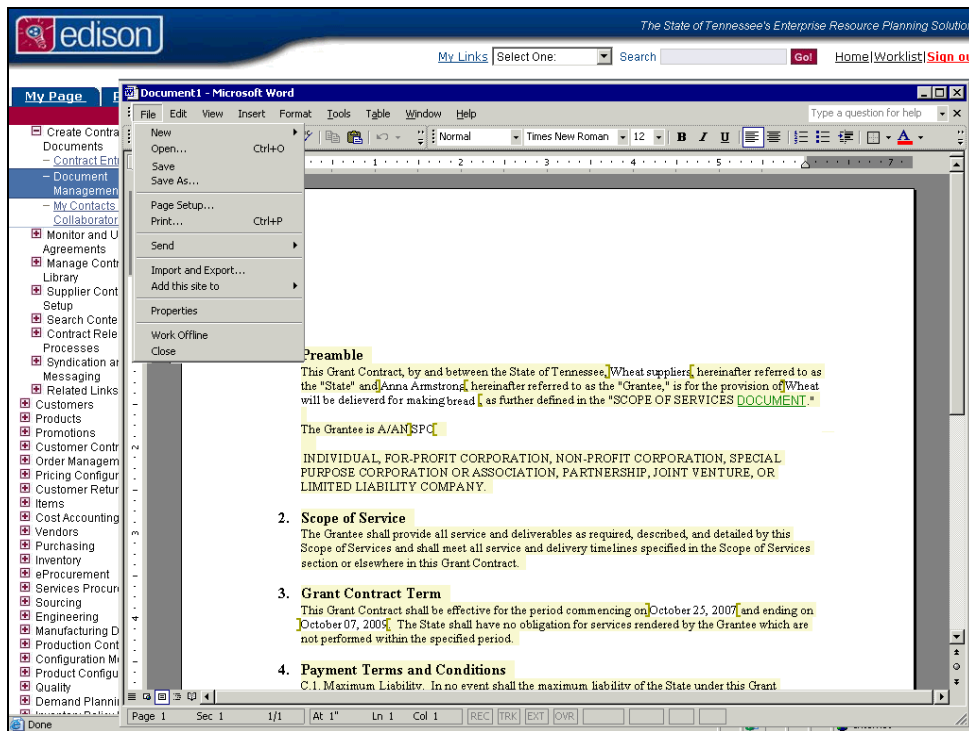
Step	Action
26.	Click the **Save** menu.
	Save
27.	Click the **Close** button.
	☒
28.	If you select the **Edit Document** button Edison considers the document to be checked out. When you load the document back in, you must **Check In** the document.
29.	**Cancel Check Out** is used when you opened the document but decided not to make changes and upload back into Edison.

Step	Action
30.	Click the **Check In** button. Check In
31.	Here you specify whether the changes you made to the document were significant or minor changes.

Step	Action
32.	Click in the **Comments** field.
33.	Enter the desired information into the **Comments** field. Enter "**Changed the wording of the preamble slightly**".
34.	Click the **OK** button. OK
35.	Click the **Browse...** button. Browse...
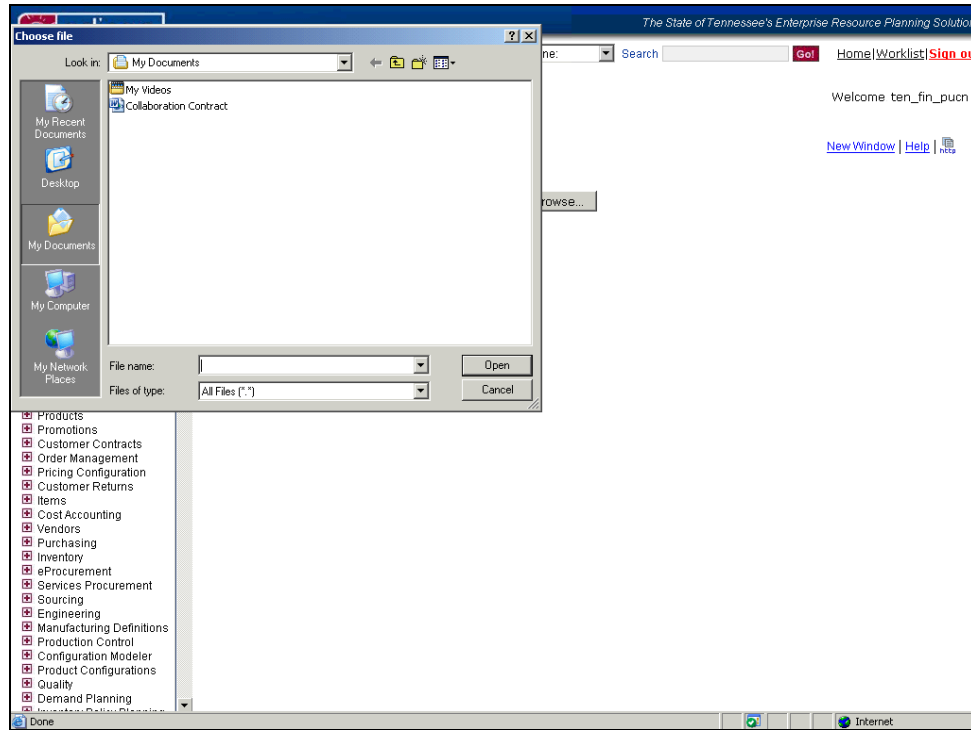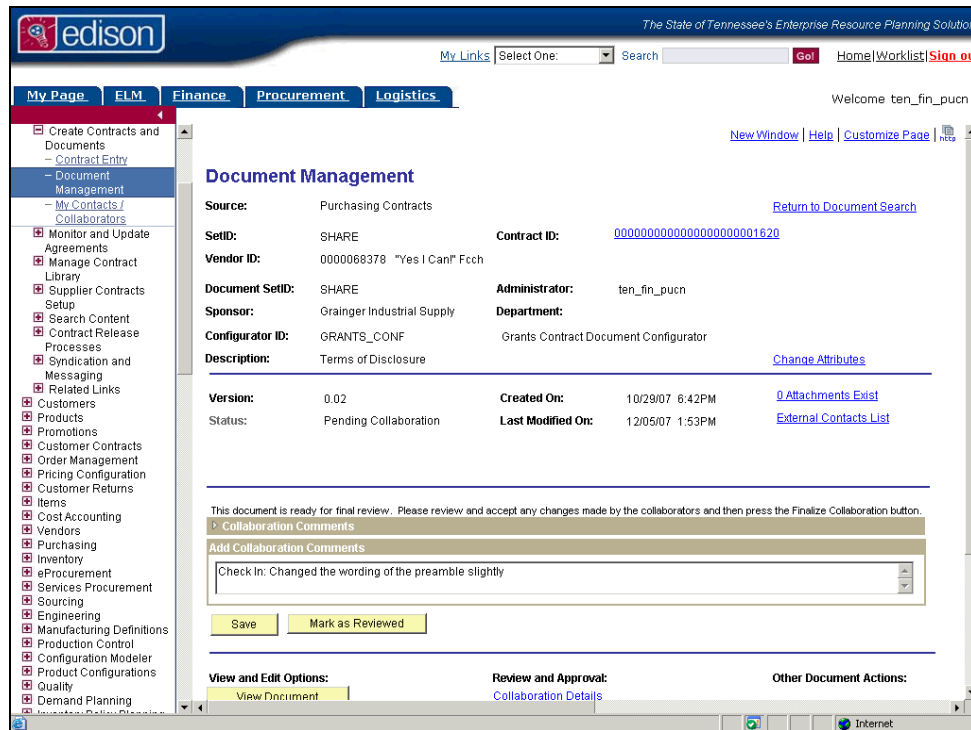
Step	Action
36.	Click the **Collaboration Contract** list item.
37.	Click the **Open** button.
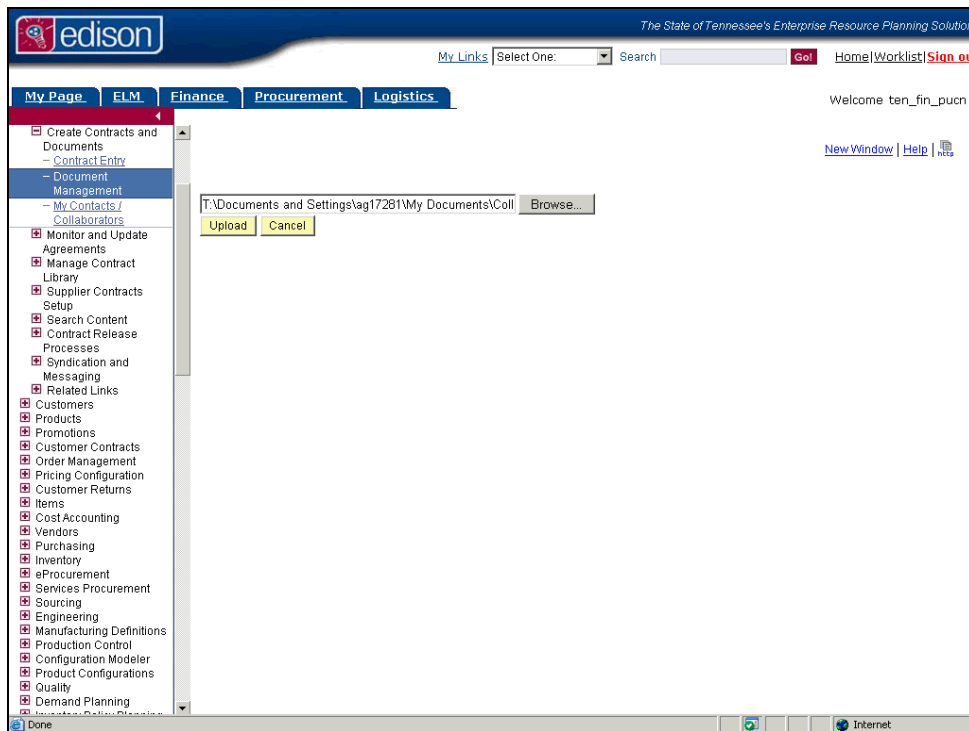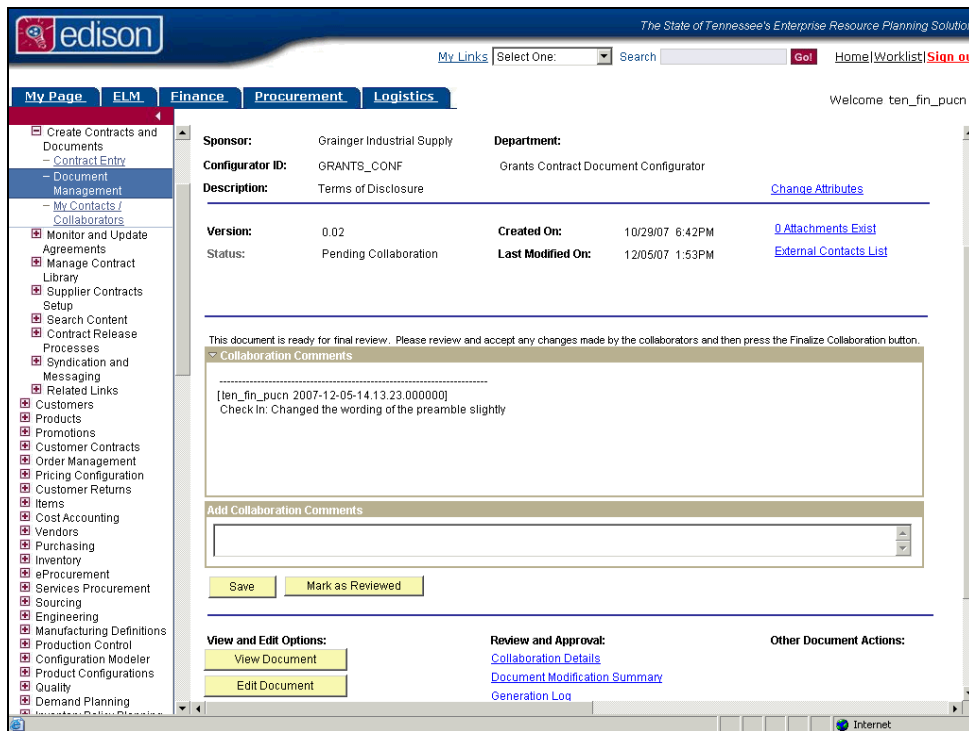
Step	Action
38.	Click the **Upload** button.

Step	Action
39.	Click the **Save** button. ![Save]
40.	Notice that the **Collaboration Comments** have changed and now include the comment that you just made before uploading the document.

Step	Action
41.	To indicate completion of your collaboration effort, the **Mark as Reviewed** button should be clicked. Click the **Mark as Reviewed** button. ![Mark as Reviewed]
42.	You have successfully collaborated on an Edison generated document. **End of Procedure.**

Searching the Library

Search Clause Content

In Edison you can keyword search clauses in the document library. The search will look in the title and body text of all the clauses in the library for the entered keyword.
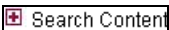
Procedure
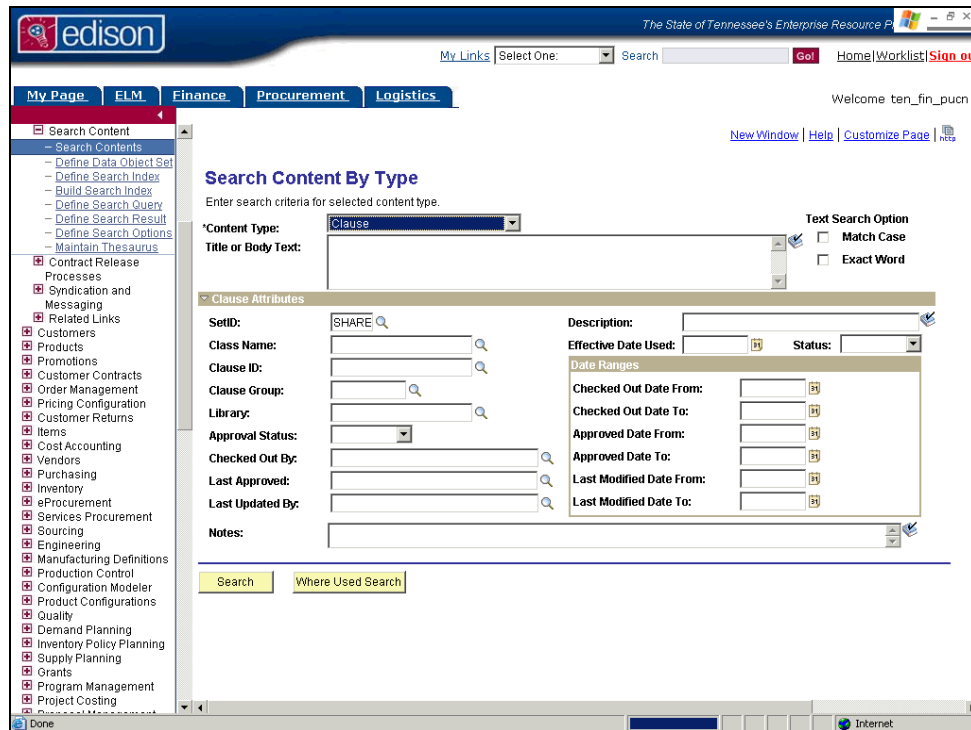
In this topic you will search the library by the content within a clause.
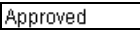
Step	Action
1.	Click the **FSCM** link.
2.	Click the **Supplier Contracts** link.
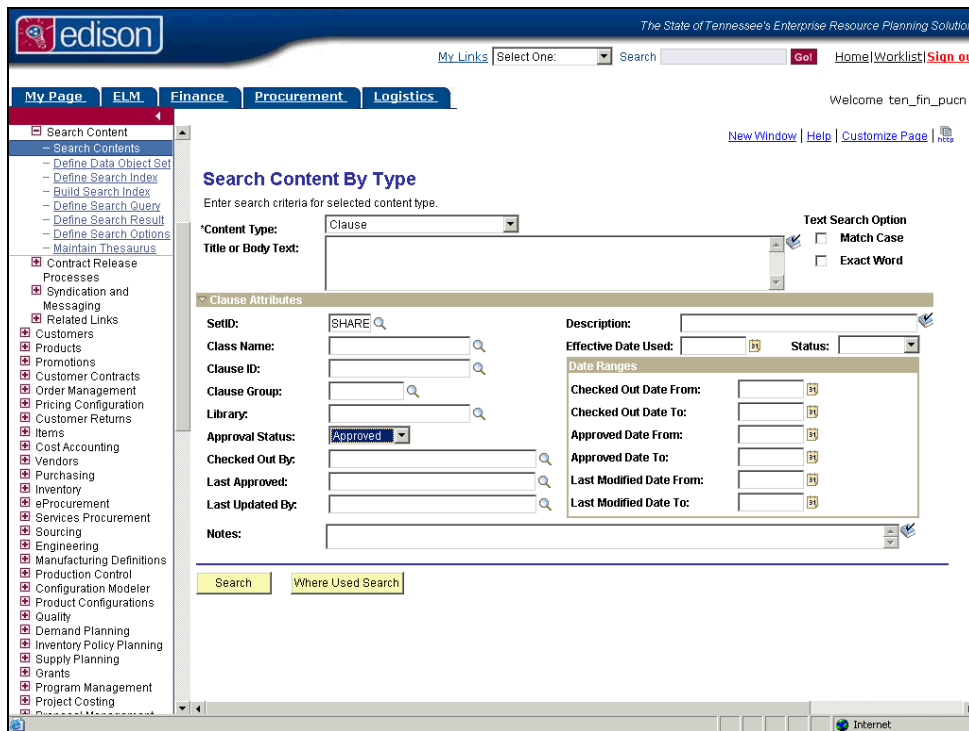
Step	Action
3.	Click the **Search Content** link. ![Search Content]
4.	Click the **Search Contents** link. ![Search Contents]
5.	Under the **Clause Attributes** section it is possible to search for a clause by any of a clause's properties.
6.	The **Where Used Search** button allows you to locate where a document element is used within the document library.

Step	Action
7.	Click the **Approval Status** list.
8.	Click the **Approved** list item.

Step	Action
9.	Click the **Search** button.

Step	Action
10.	Click the scrollbar.
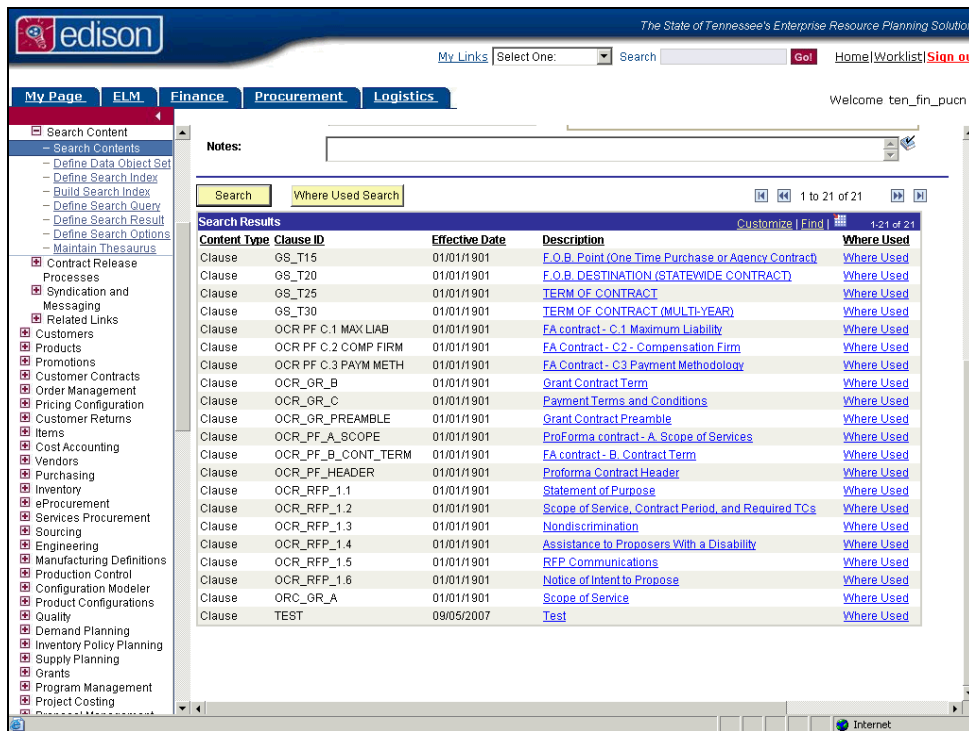
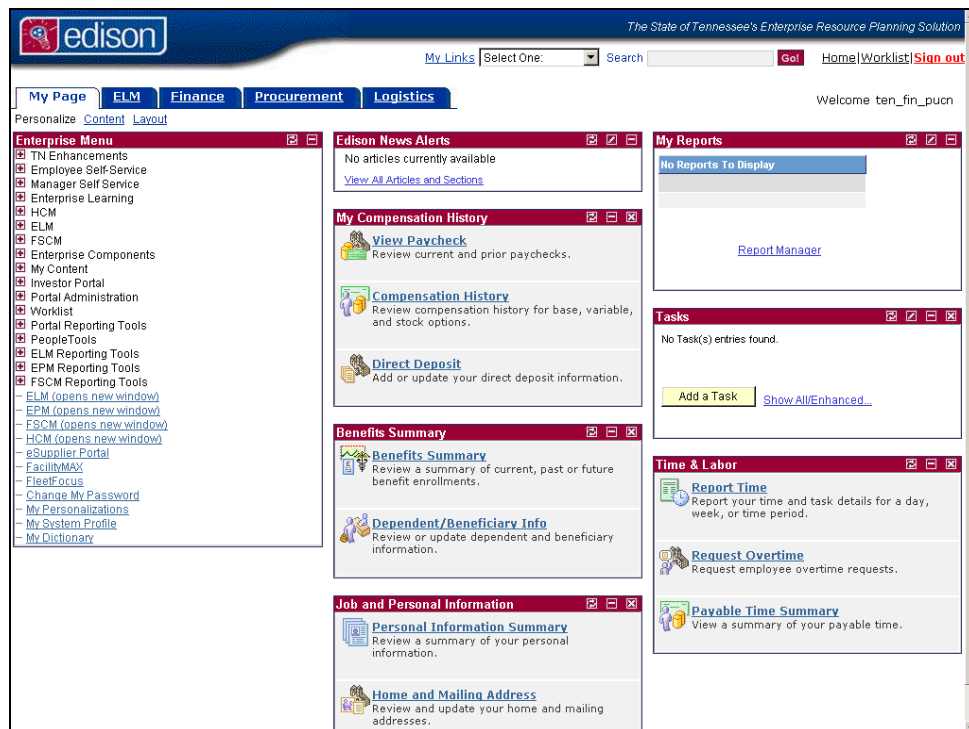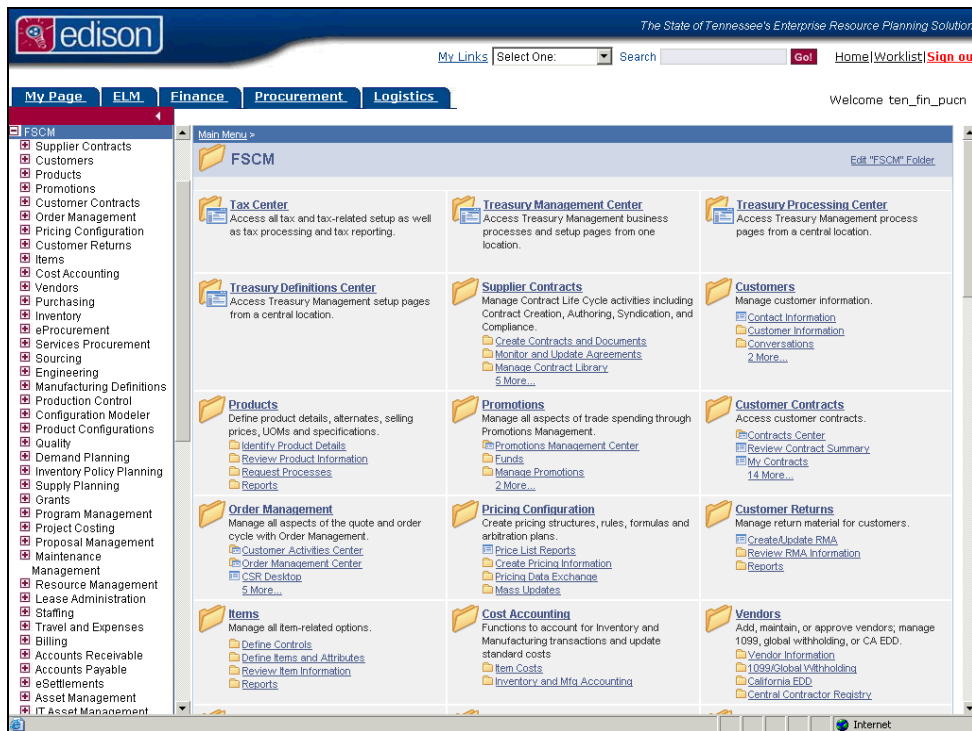| Step	Action
11.	Click an entry in the **Description** column. ProForma contract - A. Scope of Services
12.	A new window will pop up after you select the desired clause. This page will present the Clause Definition.
13.	You have successfully searched the library by the content within a clause. **End of Procedure.**

Search Document Content

In Edison you can keyword search documents in the library. You can specify your search to look through any of the attribute fields of a document (Library ID, Description, Document Type, Document status, etc.). You can search for ad hoc, transactional contracts, and contract attributes.
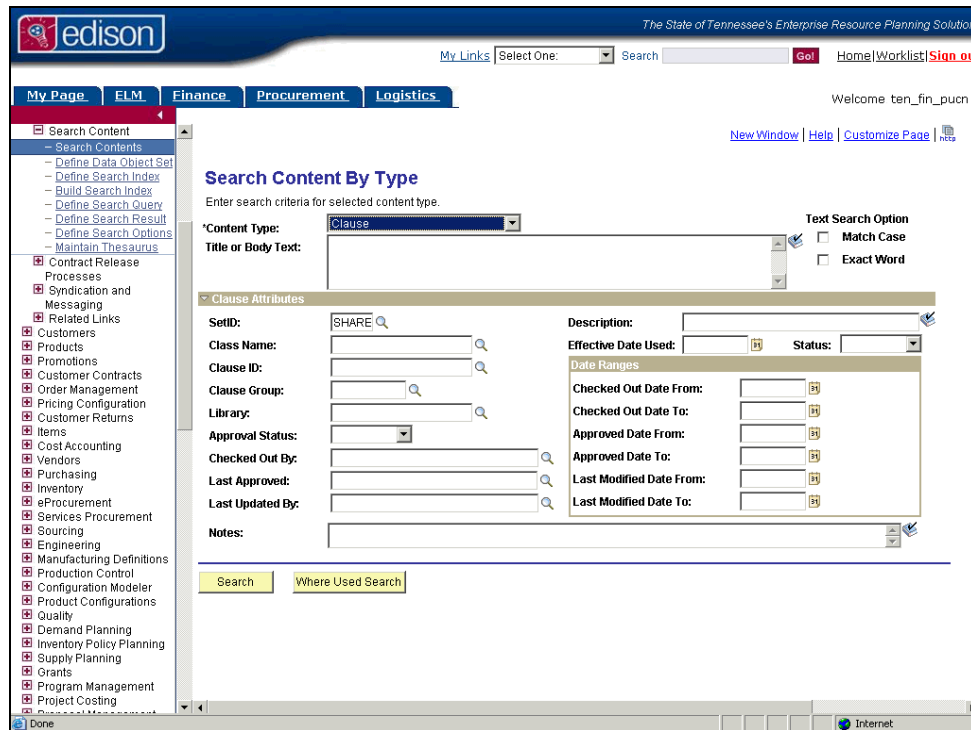
Procedure

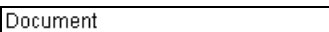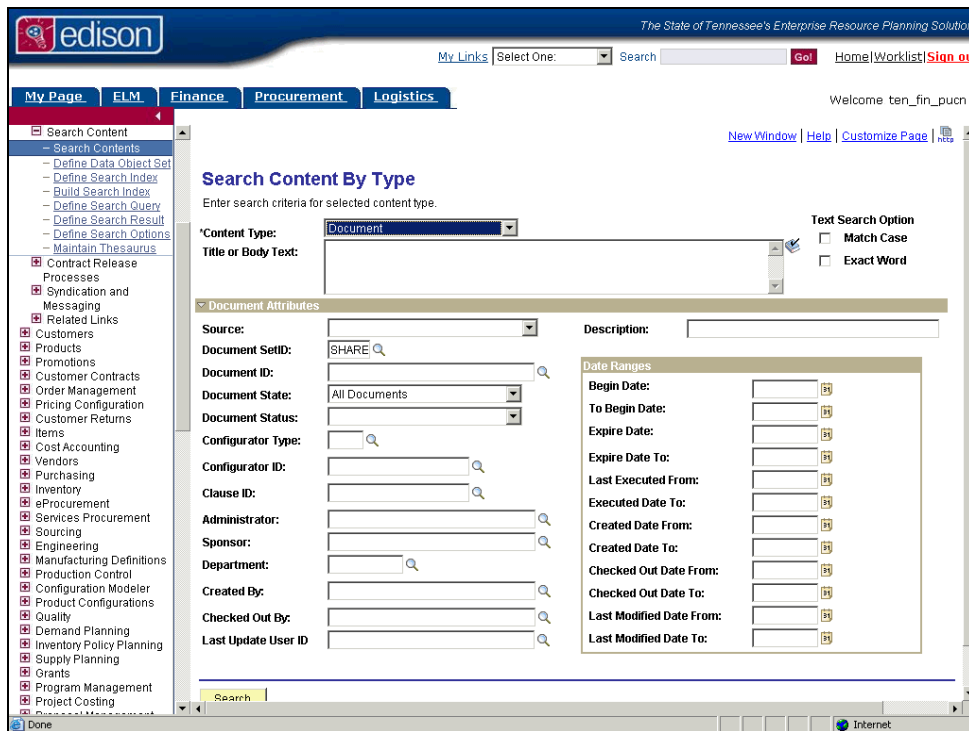In this topic you will search the library by the content within a document.

Step	Action
1.	Click the **FSCM** link. ⊞ FSCM

Step	Action
2.	Click the **Supplier Contracts** link. ⊞ Supplier Contracts
3.	Click the **Search Content** link. ⊞ Search Content
4.	Click the **Search Contents** link. Search Contents

Step	Action
5.	Click the **Content Type** list. Clause ▼
6.	Click the **Document** list item. Document
7.	If the **Content Type** is changed new search fields will appear.

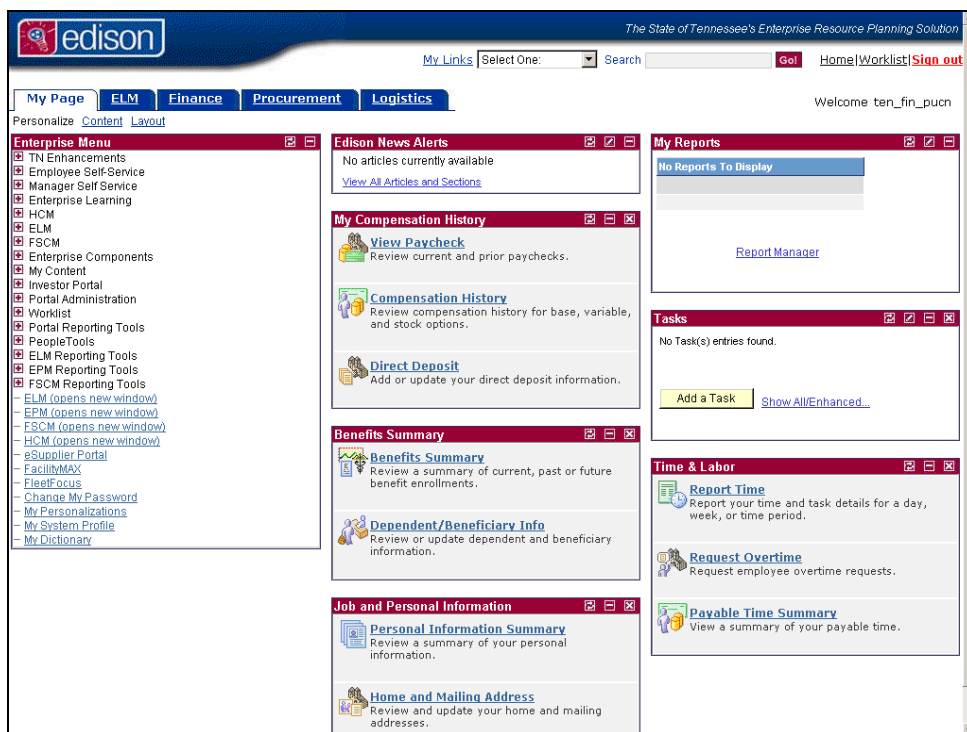| Step	Action
8.	Click in the **Begin Date** field.
9.	Enter the desired information into the **Begin Date** field. Enter "**8/2/07**".
10.	Click the scrollbar.
11.	Click the **Search** button.
12.	Click the scrollbar.

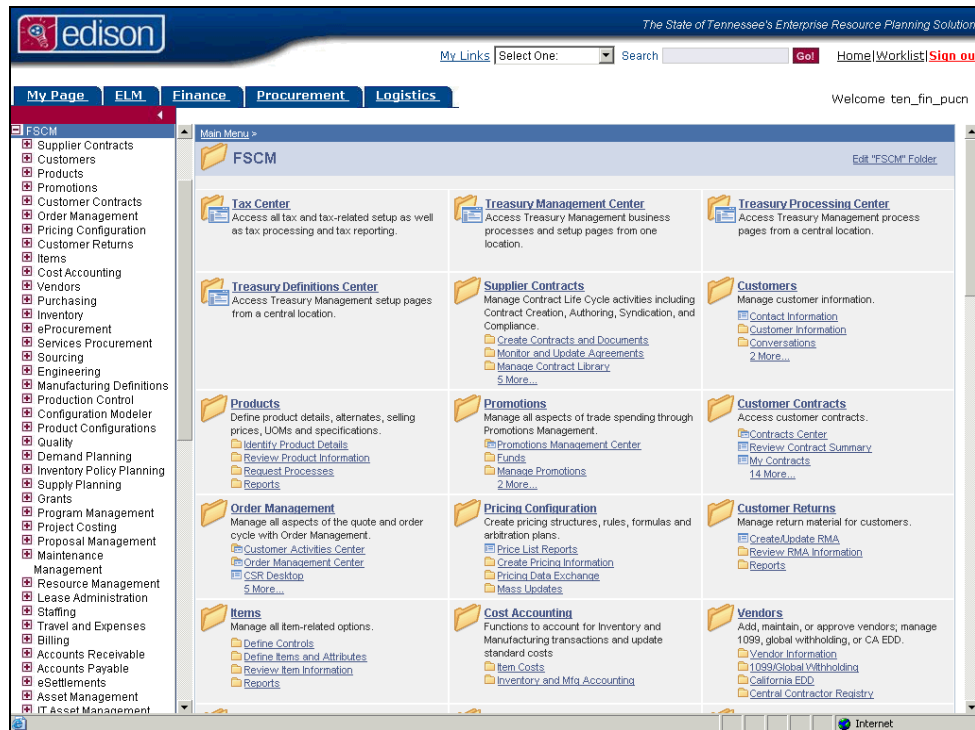| Step	Action
13.	Click an entry in the **Description** column. 33901.77 Pro Forma Contract
14.	A new window will pop up that contains all the information for the Document that was just selected.
15.	You have successfully searched the library by the content within a document. **End of Procedure.**

Search Configurator Content

In Edison you can keyword search the configurators in the document library. Options that you can search configurators by are Word Template Name, Wizard ID, Configurator Status, Created Date From, Created Date To, Approved Date From, Approved Date To, Last Modified Date From, Last Modified Date To, etc.
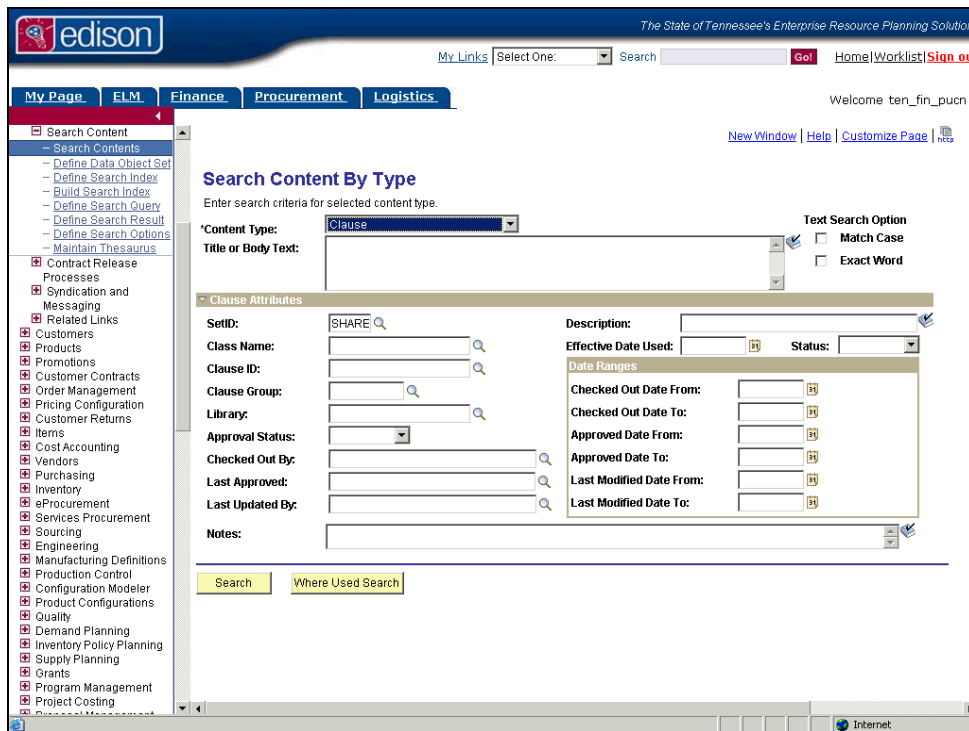
Procedure

In this topic you will search the library by the content within a configurator.

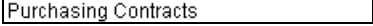| Step	Action
1.	Click the **FSCM** link. ⊞ FSCM

Step	Action
2.	Click the **Supplier Contracts** link. ⊞ Supplier Contracts
3.	Click the **Search Content** link. ⊞ Search Content
4.	Click the **Search Contents** link. Search Contents

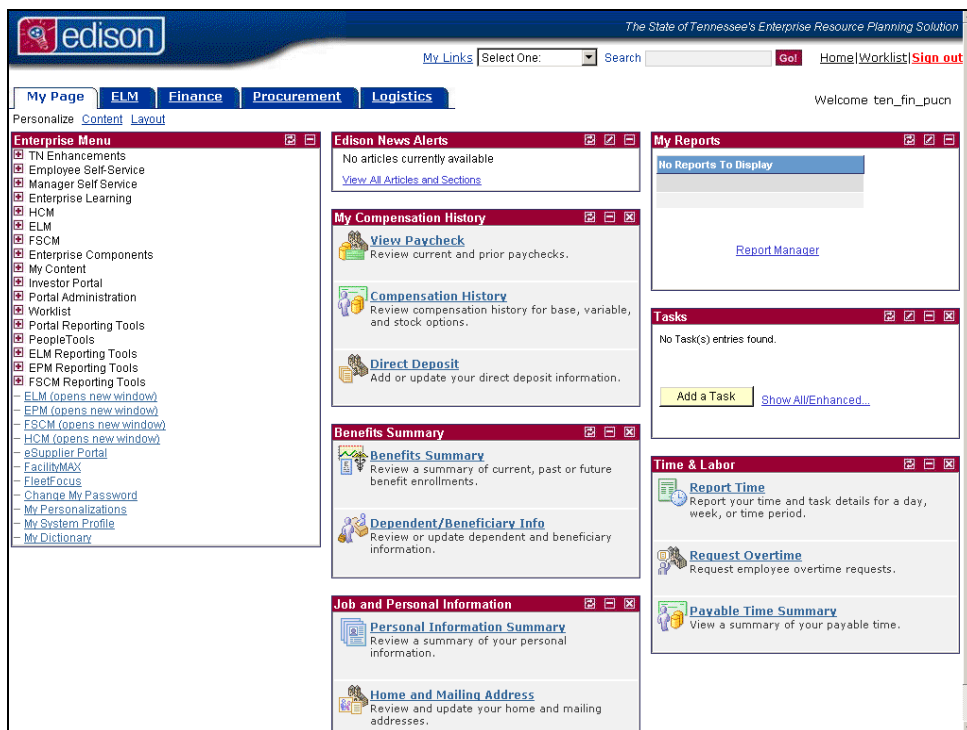| Step	Action
5.	Click the **Content Type** list.
6.	Click the **Document Configurator** list item.
7.	Click the **Source Transaction** list.
8.	Click the **Purchasing Contracts** list item.
9.	Click the **Search** button.
10.	Click the scrollbar.

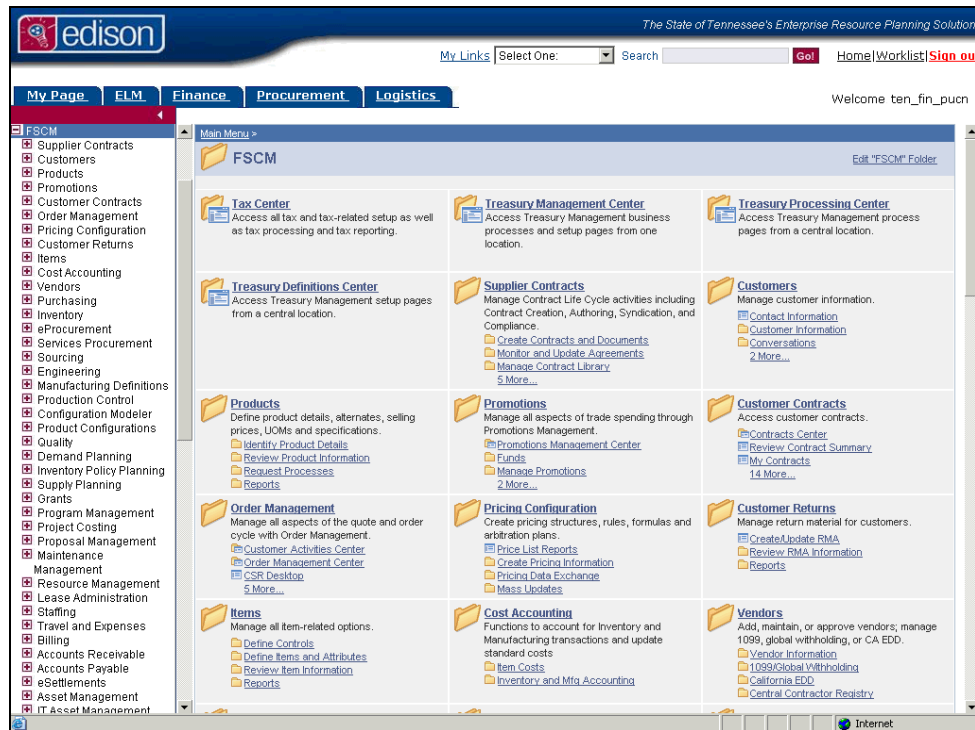| Step	Action
11.	Click an entry in the **Description** column. Commodities and Non-Professional Services Terms and Cond.
12.	A new window will pop up containing the **Document Configurator Definition** for the Commodities and Non-professional Services Document.
13.	You have successfully searched the library by the content within a configurator. **End of Procedure.**

Search Section Content

In this topic you will search the library by the content within a section. This search enables you to find sections by title, body text, clause id, and many other section attributes.
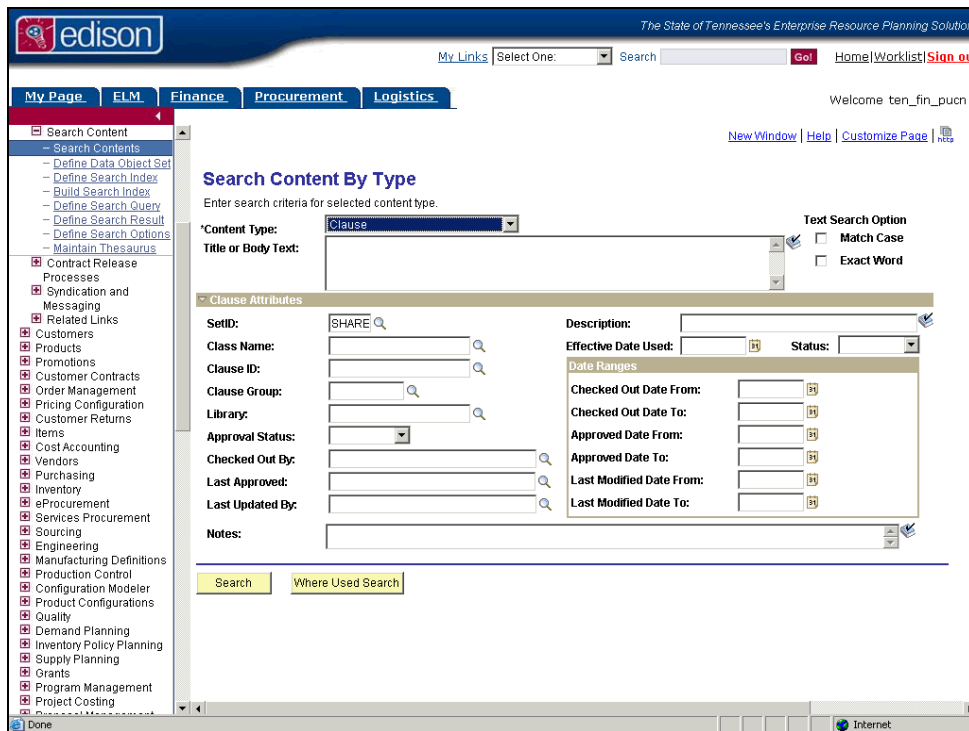
Procedure

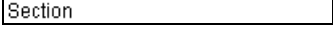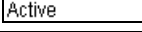In this topic you will search the library by the content within a section.

Step	Action
1.	Click the **FSCM** link. ⊞ FSCM

Step	Action
2.	Click the **Supplier Contracts** link. ![Supplier Contracts]
3.	Click the **Search Content** link. ![Search Content]
4.	Click the **Search Contents** link. ![Search Contents]

Step	Action
5.	Click the **Content Type** list. Clause
6.	Click the **Section** list item. Section
7.	Click the **Status** list.
8.	Click the **Active** list item. Active
9.	Click the **Approval Status** list.
10.	Click the **Approved** list item. Approved
11.	Click the **Search** button. Search

Step	Action
12.	Click an entry in the **Description** column.
13.	A new window containing the **Section Definition** will pop up.
14.	You have successfully searched the library by the content within a section. **End of Procedure.**